

# Charlie Cook's election analysis

A review of 2016 and a look ahead at 2018 and 2020

**June 22, 2017**

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# Roadmap

**Key takeaways from the 2016 election**

**Contextualizing the 2018 midterm elections**

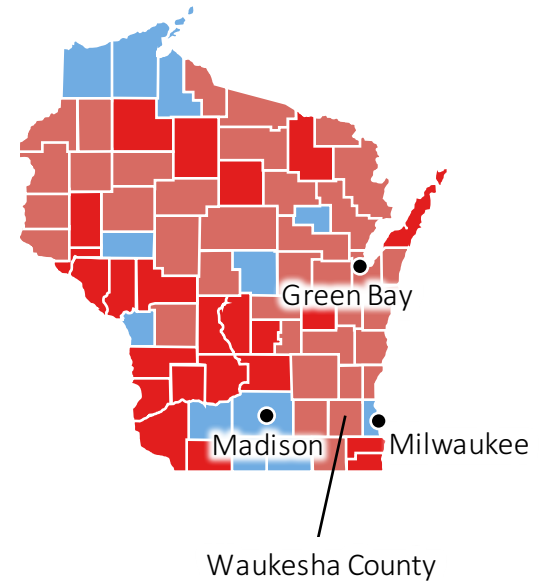
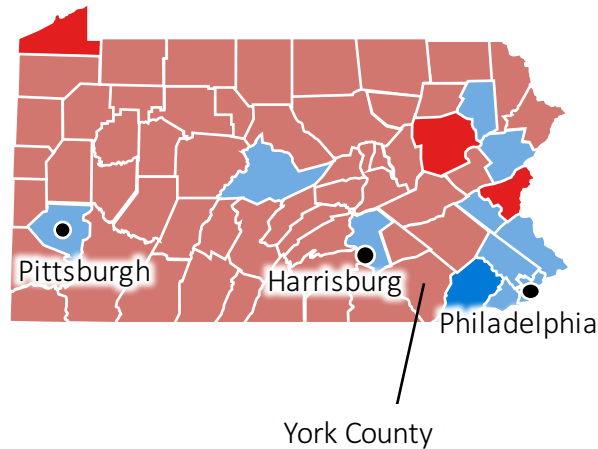
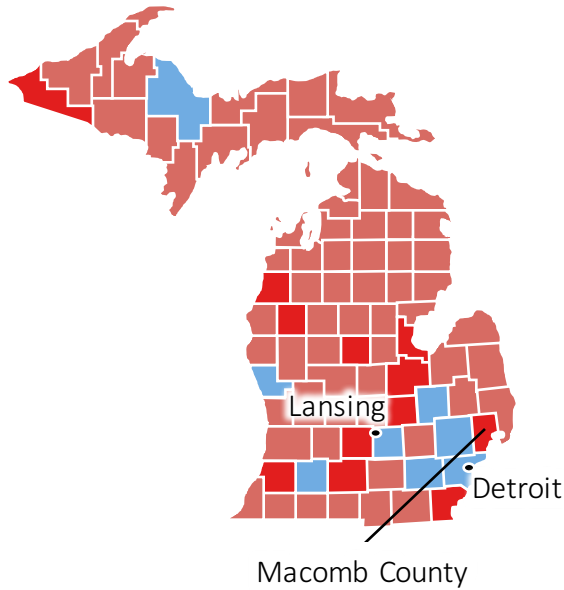
**Potential candidates in 2020**

# It came down to three states: Wisconsin, Michigan and Pennsylvania

## 2016 election results by county

Compared to 2012 results

- Voted Republican in both elections
- Voted Democratic in both elections
- Flipped Republican in 2016
- Flipped Democratic in 2016



Sources: National Journal State Election Analysis, 2017.

# Michigan (surprise): Trump won by 10,704 votes

## 2016 election analysis

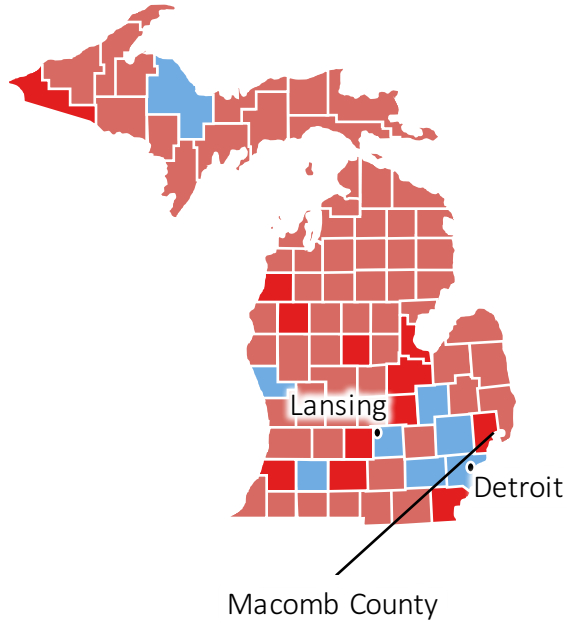
Candidate	Votes	Pct.
Donald Trump/Mike Pence	2,279,543	47.6%
Hillary Clinton/Tim Kaine	2,268,839	47.3%
Gary Johnson/Bill Weld	172,136	3.6%
Jill Stein/Ajamu Baraka	51,463	1.1%

### Rural Turnout: 63%

Candidate	Pct.	Votes
Trump/Pence	60.2%	500,709
Clinton/Kaine	32.7%	271,625

### Urban Turnout: 65%

Candidate	Pct.	Votes
Clinton/Kaine	49.3%	1,997,214
Trump/Pence	43.9%	1,778,834



**Final Real Clear Politics Average:**  
**Clinton +3.4**

**Actual Result:**  
**Trump +0.3**

Sources: National Journal Research, 2016; Associated Press, 2016; Wisconsin Secretary of State, "Recount Results by County," 2016.

# Pennsylvania (big surprise): Trump won by 44,292 votes

## 2016 election analysis

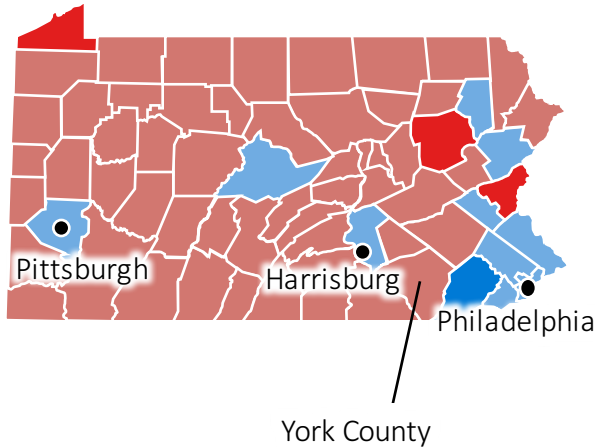
Candidate	Votes	Pct.
Donald Trump/Mike Pence	2,970,733	48.2%
Hillary Clinton/Tim Kaine	2,926,441	47.5%
Gary Johnson/Bill Weld	146,715	2.4%
Jill Stein/Ajamu Baraka	49,941	0.8%

### Rural Turnout: 68%

Candidate	Pct.	Votes
Trump/Pence	69.0%	792,193
Clinton/Kaine	28.0%	331,472

### Urban Turnout: 69%

Candidate	Pct.	Votes
Clinton/Kaine	52.8%	2,594,969
Trump/Pence	44.1%	2,178,540



**Final Real Clear Politics Average:**  
**Clinton +1.9**

**Actual Result:**  
**Trump +0.7**

Sources: National Journal Research, 2016; Associated Press, 2016; Wisconsin Secretary of State, "Recount Results by County," 2016.

# Wisconsin (huge surprise): Trump won by 22,748 votes

## 2016 election analysis

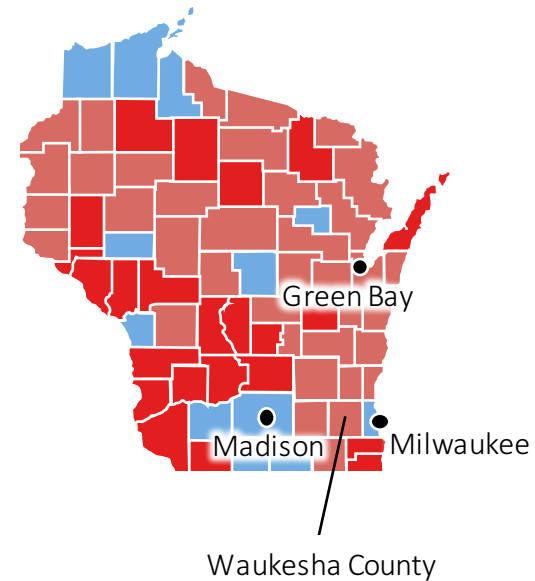
Candidate	Votes	Pct.
Donald Trump/Mike Pence	1,405,284	47.2%
Hillary Clinton/Tim Kaine	1,382,536	46.4%
Gary Johnson/Bill Weld	106,674	3.6%
Jill Stein/Ajamu Baraka	31,072	1.1%

### Rural Turnout: 85%

Candidate	Pct.	Votes
Trump/Pence	56.4%	331,898
Clinton/Kaine	37.9%	222,446

### Urban Turnout: 83%

Candidate	Pct.	Votes
Clinton/Kaine	48.6%	1,160,090
Trump/Pence	44.9%	1,073,386



**Final Real Clear Politics Average:**  
**Clinton +6.5**

**Actual Result:**  
**Trump +0.8**

Sources: National Journal Research, 2016; Associated Press, 2016; Wisconsin Secretary of State, "Recount Results by County," 2016.

# Incorrect expectations: turnout lower for key Dem groups and Trump pulled more votes from the Obama base

## 2016 election turnout by voting group

Compared to 2012 results

■ Increase in turnout ■ Decrease in turnout

	Group	2012	2016	Change
<b>Overall</b>		58.6%	60.2%	+1.6
<b>Race</b>	Non-Hispanic White	61.8%	64.7%	+2.9
	Non-Hispanic Black	67.4%	59.9%	-7.5
	Hispanic	43.1%	44.9%	+1.8
	Other	45.4%	46.3%	+0.9
	<b>Age</b>	18-29	40.9%	43.4%
	30-44	56.2%	56.9%	+0.7
	45-59	66.0%	66.2%	+0.2
	60+	71.2%	71.4%	+0.2

### Analysis

- Expected only 5% decrease in African American turnout, was actually 7.5%
- Latinos did not turn out *en masse* as expected
- Too many younger voters splintered off to Stein and Johnson or stayed home
- Trump over-performed polls for **white, moderate, suburban, college-educated women**
- Unexpectedly large turnout for Trump:
  - Small town and rural voters
  - White working class voters
  - White lower middle class voters

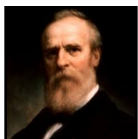
Sources: Michael McDonald, United States Election Project, Accessed June 20, 2017.

# Only five U.S. presidents have lost the popular vote

## Presidents who lost the popular vote



1824: John Quincy Adams lost the popular vote to Andrew Jackson, but won the Electoral College.



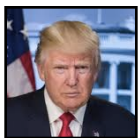
1876: Democratic candidate Samuel Tilden, despite winning the popular vote, was narrowly defeated in the Electoral College by Republican Rutherford B. Hayes.



1888: Democrat Grover Cleveland, winner of the popular vote, lost out to Benjamin Harrison in terms of Electoral College votes.



2000: George W. Bush won the Electoral College, but lost the popular vote to Al Gore.

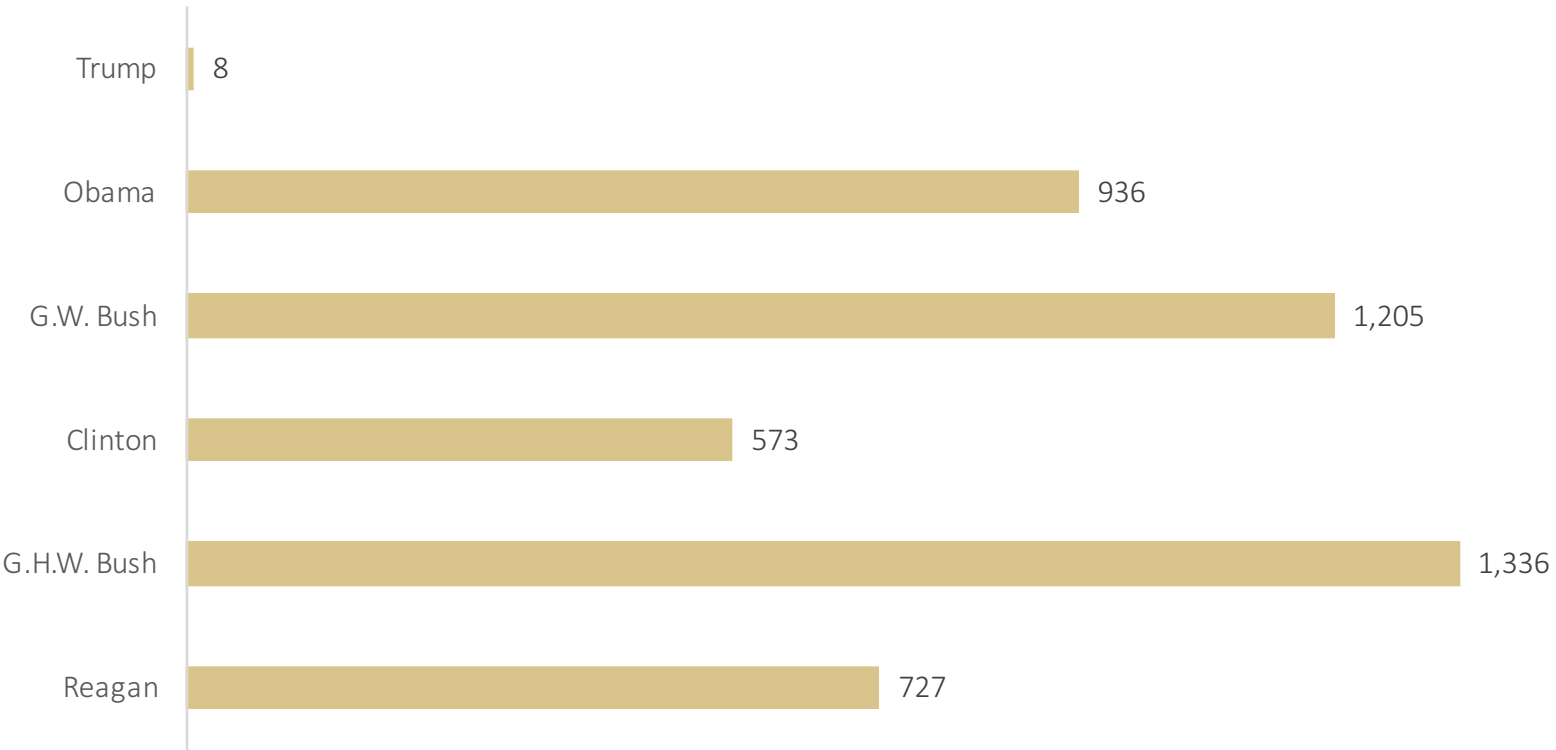


2016: Hillary Clinton won the popular vote, but lost the Electoral College to Donald Trump.



# President Trump’s disapproval rating hit 50% much earlier in his presidency than his predecessors

Days until presidential disapproval hits 50% for the first time

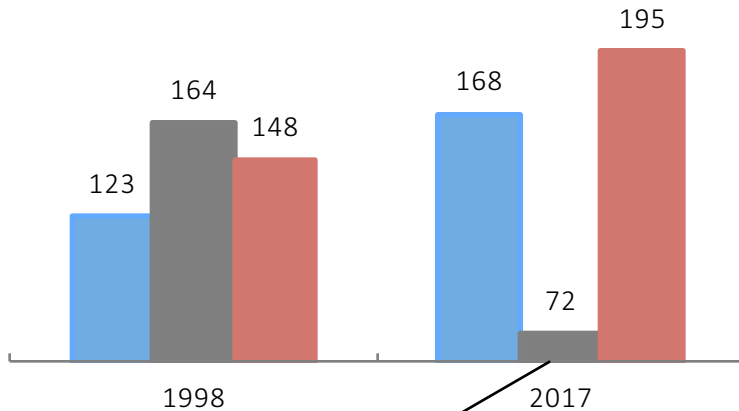


Source: Cook subscriber briefing, April 4, 2017; Charlie Cook, "Uphill climb for Democrats in 2018," The Cook Political Report, December 2, 2016.

# Trump was elected in an extremely polarized political climate

## House makeup by Cook Partisan Vote Index

- Democratic (D+5 or greater)
- Swing (D+5 to R+5)
- Republican (R+5 or greater)



Only 72 swing districts – 92 fewer than in 1998

**Analysis**

- Just like Democrats had “ownership” of Obama’s moves, Republicans have “ownership” of Trump’s actions
- The middle ground has disappeared for members to dissent from their party leader



“The enemy of my enemy is my friend.”  
 – Ancient adage, which expresses the contemporary reason Republicans have not criticized Trump

Sources: The Cook Political Report, 2017.

# Roadmap

**Key takeaways from the 2016 election**

**Contextualizing the 2018 midterm elections**

**Potential candidates in 2020**

# Midterm elections are usually a referendum on the president's party

## Understanding midterm elections



“The voters who are most motivated in midterm elections tend to be those who are angry and/or disaffected.” – Charlie Cook

## First term examples

**1994:** President Clinton's first term midterm, backlash on taxes and Hillarycare

**2010:** President Obama's first term midterm, backlash on Obamacare

## Second term examples

**2006:** President G.W. Bush's second term midterm, backlash against Bush and Iraq War

**2014:** President Obama's second term midterm, backlash due to economy and anti-Obama sentiment

# The president's party has lost seats in the House in 35 out of 38 midterm elections since the end of the Civil War

## Exceptions to the trends in midterm elections



### House of Representatives

*The president's party has lost House seats in 35 out of the past 38 (92%) midterm elections since the end of the Civil War.*

#### Exceptions:

- **1934:** Voters were still resentful of Herbert Hoover's presidency after throwing him out in 1932
- **1998:** There was a backlash against Republicans after the House impeached Bill Clinton
- **2002:** This was the midterm election 14 months after 9/11



### Senate

*Since the 17<sup>th</sup> Amendment on direct election of senators went into effect in 1913, the president's party has lost Senate seats in 19 out of 26 (73%) of midterm elections.*

#### Exceptions:

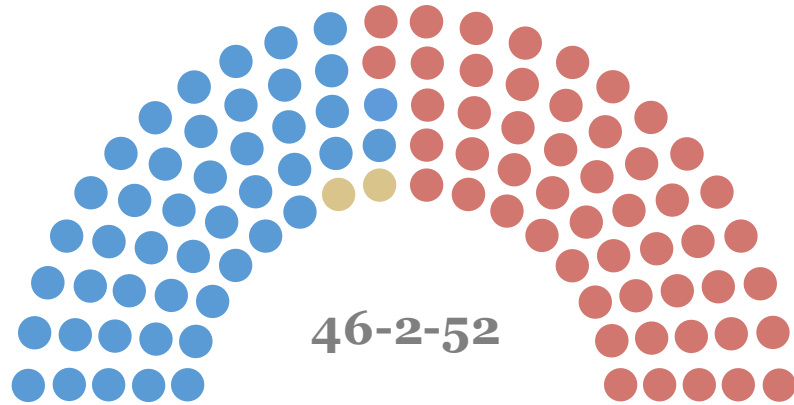
- **1962:** This vote occurred the week after the Cuban Missile Crisis bolstered Democrats
- **1998:** There was a backlash against Republicans after the House impeached Bill Clinton
- **2002:** This was the midterm election 14 months after 9/11

# Senate Democrats are over-exposed compared to Republicans with 25 seats facing an election in 2018

## Senate control vs. seats facing an election in 2018

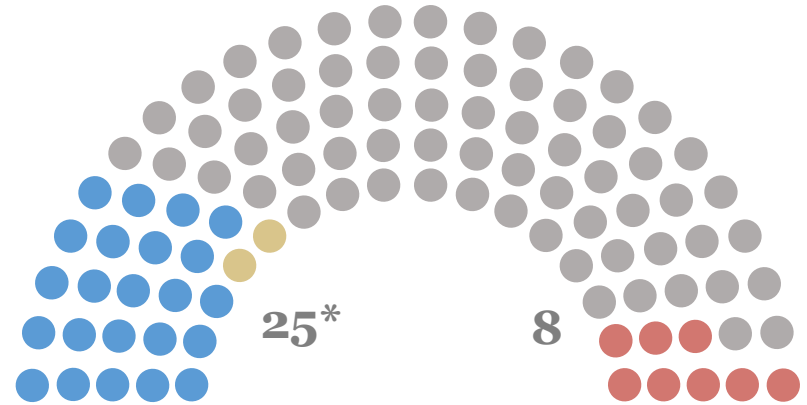
■ Democrats ■ Republicans ■ Independents

Control of the 115<sup>th</sup> Senate (2016-2018)



Republican Senate Majority

Seats facing an election in 2018



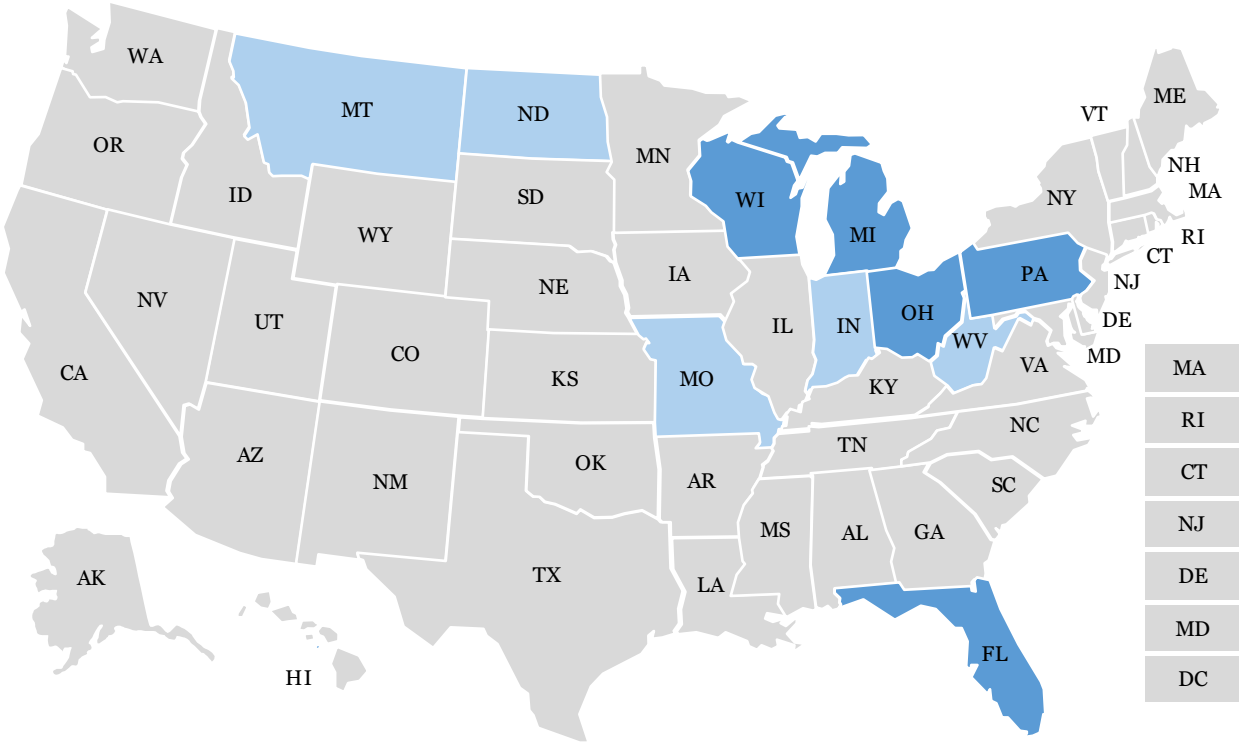
\*Two independents that caucus with Democrats will be up for re-election in 2018.

Sources: Cook Political Report, 2017.

# Democrats face Senate elections in 10 states that Trump won, 5 of which he won by 19 or more points

## 2018 Senate elections in states won by an opposing party in 2016

■ State that Trump won with a 2018 Senate election ■ State that Trump won by a large margin with a Senate 2018 election



**Analysis**

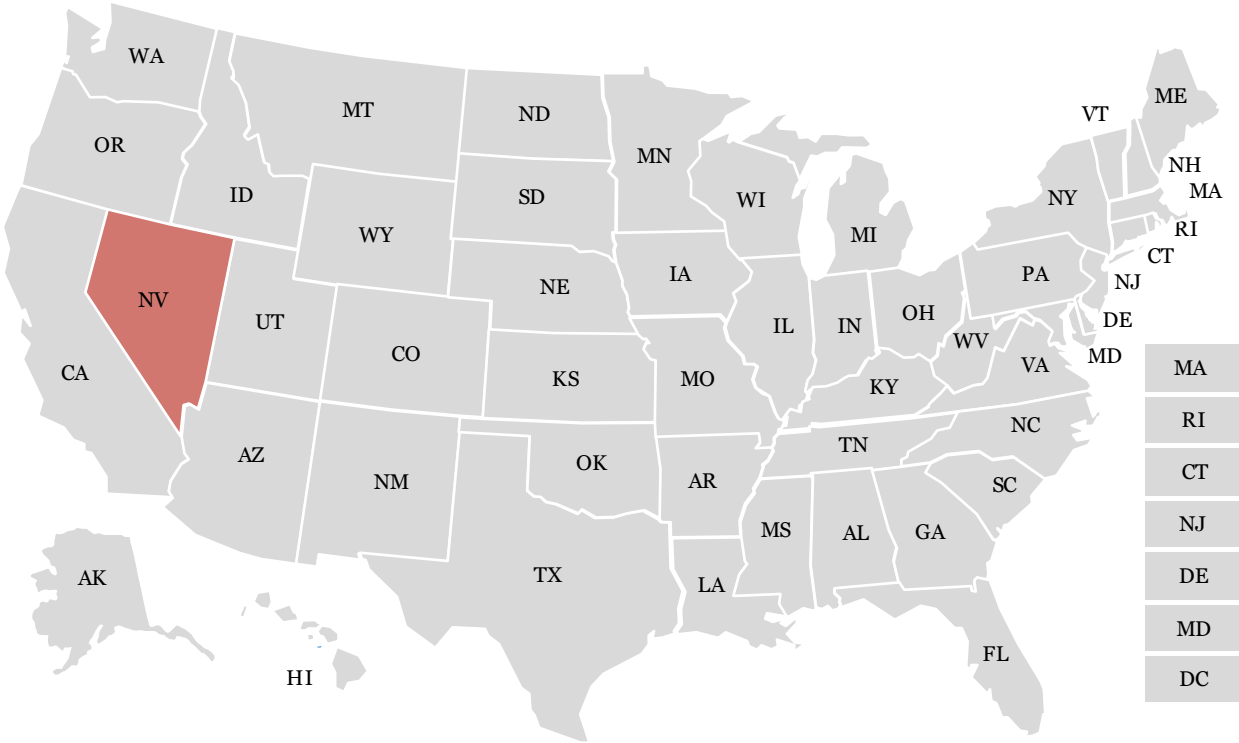
- Mitt Romney also won all five of the states Trump won by large margins
- Wisconsin, Michigan, Pennsylvania, Ohio and Florida are all states that Obama won in 2012 that flipped to Trump in 2016

Sources: Cook Political Report, 2017.

# Only one Senate Republican faces re-election in a state that Clinton won in 2016

## 2018 Senate elections in states won by an opposing party in 2016

■ Up for re-election in a Clinton state



**Analysis**

- Dean Heller is expected to run for re-election in Nevada
- Heller won in 2012 despite Obama winning the state the same day

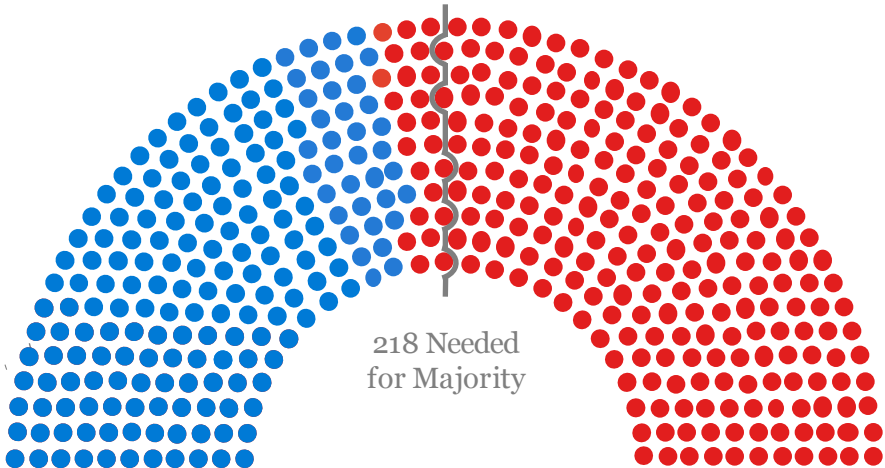
Sources: Cook Political Report, 2017.



# Republicans have full ownership of the federal government

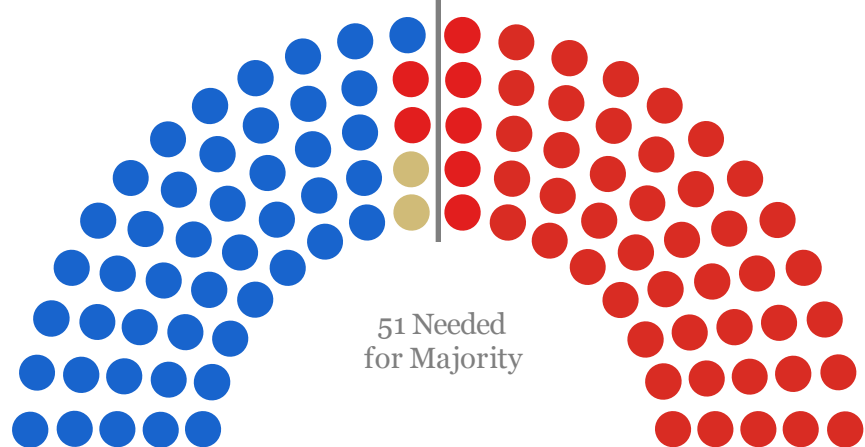
## Party control of the 115<sup>th</sup> Congress (2017-2019)

■ Democrat ■ Republican ■ Independent (caucusing with Dems)



194 - 241

Republican House Majority



46-2-52

Republican Senate Majority

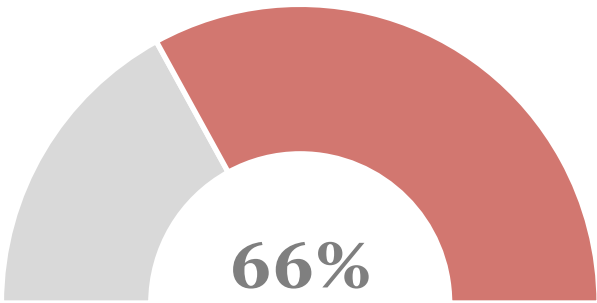
**Analysis**

- With full ownership of the government, Republicans are now responsible for keeping the government afloat and assume total accountability
- Democrats as the minority party have the luxury of “just throwing rocks” and can propose/oppose policies with less consequences

Sources: Cook Political Report, 2017.

# Most congressional Republicans have never served under a Republican president

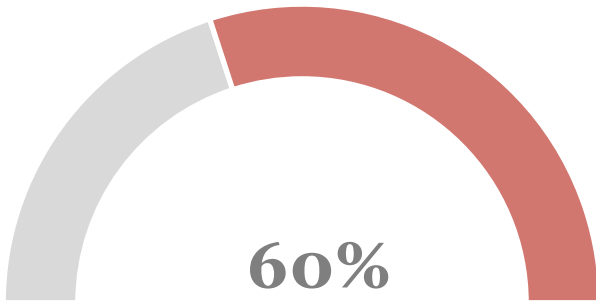
## Experience with a Republican president, by legislative body



House GOP members that have **not** served under a Republican president

**House**

(193 – 241)



Senate GOP members that have **not** served under a Republican president

**Senate**

(46-2-53)

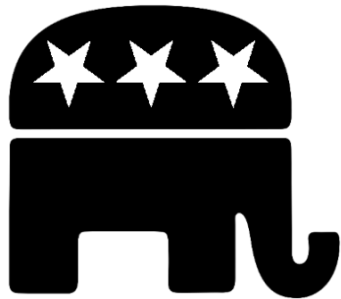
**Analysis**

- These members have always served as the opposition party
- House GOP members have voted over 60 times to repeal Obamacare without proposing a replacement
- Now things are different, they are now full partners with the Senate and President in being the governing party

Sources: Cook Political Report, 2017.

# Republicans are stuck between Trump and a hard place as he deviates from traditional conservative values

## Republican concerns with Trump



### Is Trump a true conservative or just a RINO?

- Republicans don't see President Trump as someone who truly believes in conservative principles: small government and minimal deficits
- They worry that Trump will want to spur growth in the economy with a lot of spending while also cutting taxes, causing budget deficits to soar

### The dilemma

- If Republicans oppose Trump on these issues, they are afraid that he will attack them via tweets or rallies in their home states
- They are also afraid of having Trump's backers attack them in primaries leading up to the 2018 election
- However, going along with Trump's goals would be antithetical to their conservative principles of small government and minimal deficit and risks angering their bases



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# Potential 2020 presidential candidates

## 1 former vice president



Fmr. Vice President Joe Biden

## 1 former governor



Fmr. Gov. Martin O'Malley

## 2 business people



Mark Cuban



Howard Schultz

## 10 current senators



Sen. Cory Booker



Sen. Kristen Gillibrand



Sen. Elizabeth Warren



Sen. Sherrod Brown



Sen. Kamala Harris



Sen. Chris Murphy



Sen. Al Franken



Sen. Mark Warner

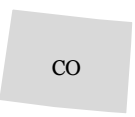


Sen. Bernie Sanders



Sen. Amy Klobuchar

## 5 current governors



Gov. John Hickenlooper



Gov. Jay Inslee



Gov. Terry McAuliffe



Gov. Andrew Cuomo



Gov. Dan Malloy

Sources: Cook Political Report, 2017.